



**STATE OF MONTANA  
SECRETARY OF STATE'S OFFICE  
JOB PROFILE AND EVALUATION**

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***SECTION I - Identification***

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**Working Title:**

Document Conversion Technician

**Department:**

Secretary of State

**Class Code Number:**

515213

**Division/ Bureau:**

Records and Information Management

**Class Code Title:**

Microfilm Print Technician

**Section/ Unit:**

Document Conversion Section

**Pay Band:**

3

**Work Address:**

1320 Bozeman St.  
Helena, MT 59601

**Position Number:** 66024, 66026

**Phone:** 406-444-9000

☐ FLSA Exempt

☒ FLSA Non-Exempt

**Profile Completed By:**

Patti Borsberry, Deputy

**Work Phone:**

406-444-9000

***Work Unit Mission Statement or Functional Description:***

The Secretary of State is one of six executive branch officers originally designated by the Montana Constitution of 1889. The duties of the secretary of state include: interpreting state election laws and overseeing elections; maintaining the official records of the executive branch and the acts of the legislature; reviewing, maintaining, and distributing public-interest records of businesses and nonprofit organizations; filing, publishing, and maintaining administrative rules adopted by state departments, boards and agencies; attesting to the governor's signature on executive orders, proclamations, resolutions, extradition papers, and appointments; preserving the state seal; filing and maintaining records of secured financial transactions, such as liens; serving on the state Board of Land Commissioners and the Board of Examiners; and commissioning notaries public. The Secretary of State's Office is divided into five bureaus: Elections, Business Services, Management Services, Administrative Rules, and Records Management.

The Records and Information Management Division (RIMD) administers and provides state enterprise records and information management (RIM) providing policy and procedures, the State Records Center, document conversion services in the areas of microfilming and imaging; serves as a training resource to state and local agencies, providing standards and guidelines essential to continuity and accountability in government.

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**Describe the Job's Overall Purpose:**

This position operates a variety of technology equipment fulfilling the agency's requirement to offer document conversion services; utilizing imaging hardware and software, personal computer, printers and other office equipment. Position follows the Division's *Document Conversion Procedures* for the handling, maintenance, preparation, filing and storage of state agency records and information. The incumbent, works under moderate supervision and is expected to complete assigned projects with moderate direction. The primary duty of this position involves the conversion of the Secretary of State-Business Services Division's corporation records into a digital, indexed system. Incumbent is responsible for high-quality, high-output production, meeting the expectations of the agency's project requirements in a professional, team-oriented manner. This position reports directly to the Document Conversion Supervisor and does not supervise other agency personnel. Lifting requirements to 30 lbs.

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**SECTION II - Major Duties or Responsibilities****% of Time**

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1. The incumbent performs technical and administrative functions for the Records and Information Management Division. The duties listed below comprise the essential functions of this position. The tasks listed are those required of the current incumbent to perform the essential functions.

**A. Electronic Imaging and Indexing using specialized hardware and software      90%**

1. Following specific criteria in preparation for electronic imaging, conducts final document preparation and batch bundling of documents for scanning and indexing, taking into account the varying requirements for each batch scanned (i.e., mainframe interface, index criteria, quality/quantity of documents, barcoding, image assurance).
2. Utilizing the state's imaging system scans and indexes each document in accordance with the division's imaging procedures. Requires working knowledge of computer technology, imaging software and hardware, peripheral hardware components, document criteria and various forms and document types.
3. Scans and Indexes each document to its pre-identified file criteria using data and imaged-based software tools. Requires the ability to interface with the (SOS) Business Service Division's (BSD) corporation database and the FileNet image repository, This process also requires a very high level of accuracy, image verification, multitask capabilities between software programs and attention to detail while completing the process in a timely manner.
4. Uses knowledge of the required electronic imaging system to work independently with the information technology (IT) staff whether internal or external to agency.
5. Documents verification controls ensuring the process and workflow are handled securely, accurately and orderly (i.e., folder verification, conversion counts, image quality, irretrievability).
6. Maintains the project-specific imaging procedures and other related documentation as created or received. needed.

**B. Records and Information Management****5%**

1. Acknowledges document lifecycle for records storage transfer (RM2) applying low-cost, off-site retention and disposition rules.
2. Provides access and support to BSD compliance staff or other internal customers when hardcopy records are needed for daily operations. Exercises detail and accountability during the maintenance and handling of state public records.
3. Utilizes general office equipment as required (i.e., printers, fax, photocopiers).

**C. Maintains the operation and esthetics of the office and its environment.****5%**

1. Exercises office administration, internal and external customer service standards, policy and procedure implementation, ability to communicate effectively orally and in writing, responsive to information in a timely and accurate manner.
2. Conducts in-depth research involving multiple data and hardcopy sources.

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**2. *Specific examples of problems solved, decisions made, or procedures followed when performing the most frequent duties of this position include:***

Problems and decisions relate to poor quality document conversion input or output, equipment needs or repairs, troubleshooting of software application or hardware equipment, problem solving, identifies areas of error or adjustment.

**3. *The most complicated aspect of this position is:***

The most complicated part of the job involves learning and adjusting to the criteria surrounding the project and the diverse variety of agency's specifications. The variance requires knowledge and skills associated with scanning techniques, indexing criteria, process procedures and standards and quality production.

**4. *Guidelines, manuals, or written procedures that support this position include:***

Available guidelines, manuals, and written procedures available to the incumbent include: Records and Information Management Document Conversion Procedures Manual, ANSI/AIIM Standards (Association of Information and Image Management), Secretary of State Employee Handbook of Policies and Procedures and the Document Conversion Imaging Procedures for Business Services Division.

**5. *Which of the duties and/or specific tasks listed under 1. (above) are considered "essential functions" that must be performed by this position (with or without accommodations)?***

The following duties are considered essential functions because they require specialized expertise and skill and are the primary reasons the job exists:

Duty A:

**Document Conversion Services: serves the Business Services and Records and Information Management Division's in the capacity of document conversion of agency corporation records to a digital medium, insuring quality processing, production and output.**

The employee is responsible for the indexing and scanning of agency documents utilizing imaging hardware and software. Requires interaction with internal IT and DOA-ITSD FileNet support staff to establish and follow indexing structures and format requirements.

The following mental and physical demands are associated with these essential functions:

**PHYSICAL**

- Lifting (30 lbs. or less)
- Carry light items
- Remaining seated for extended periods of time, with occasional walking; standing; bending
- Operating a personal computer and peripheral resources
- Communicate in writing, in person, and over the phone

**MENTAL**

- Deal with the public on a regular basis
- Ability to multi-task
- Demands for accuracy in all aspects of work
- Ability to meet deadlines
- Comparing data
- Compiling information
- Analyzing, Synthesizing
- Coordinating
- Negotiating
- Instructing

6. ***Does this position supervise others?*** ☐ Yes ☒ No

**Number directly supervised:**

**Complexity level of the positions supervised:**

**Position Number(s) of those supervised:**

7. ***This position is responsible for:***

- |   |                                     |                                      |                                    |
|---|-------------------------------------|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Hiring                 | <input type="checkbox"/> Firing     | <input type="checkbox"/> Supervision | <input type="checkbox"/> Pay Level |
| <input type="checkbox"/> Performance Management | <input type="checkbox"/> Promotions | <input type="checkbox"/> Discipline  |                                    |
| <input type="checkbox"/> Other:                 |                                     |                                      |                                    |

8. ***Attach an Organizational Chart.***

(ATTACHED)

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***SECTION III - Minimum Qualifications - List minimum requirements for the first day of work.***

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**Critical knowledge and skills required for this position:**

**KNOWLEDGE:**

This position requires considerable knowledge of Windows-based operating systems; also standard office practices and procedures. Knowledge of the Business Services Division and the associated forms and documents is highly desirable or must be acquired during the training and probation period. Some knowledge of spreadsheet and database software is desirable,

preferably and Mainframe, Excel and Microsoft Access. General knowledge of records and information management is desirable.

#### **SKILLS:**

This position requires skills in personal computers, scanning equipment, laser printers, photocopy machines, multi-line phone systems, fax machines, and hand calculators.

#### **Behaviors required performing these duties:**

- **Verbal Communication:** Keeps appropriate individuals informed. Listens to others respectfully, understands or seeks clarification, and responds appropriately demonstrating tact and diplomacy. Expresses thoughts and ideas clearly.
- **Written Communication:** Writes clearly, logically and effectively using proper style, tone, grammar, spelling and punctuation.
- **Flexible at Work:** Responds positively to changes in direction, priorities, responsibilities, personnel or assignments. Works effectively in a variety of situations and with a variety of individuals or groups.
- **Working with Others:** Relates to others in an open and accepting manner; is approachable. Offers and accepts opinions constructively. Adjusts to how individuals and the work unit will react. Treats others with respect. Constructively resolves disagreements. Is open to others' ideas and gives credit and recognition to others.
- **Responsive to Work Needs:** Willing to perform different jobs, cross train, or assist wherever needed. Is aware of co-worker workload and responds accordingly.
- **Takes Action:** Takes effective and appropriate action to perform job duties without being reminded. Willingly accepts more responsibility or more work.
- **Forward Looking:** Suggests improvements and new ideas, technologies, and approaches. Willingly applies new and evolving ideas, methods, designs and technologies to work.
- **Efficiency and Focus:** Uses time effectively and prioritizes tasks. Is aware of workload and makes appropriate adjustments to meet deadlines and complete tasks. Handles interruptions or distractions and stays on task. Achieves goals.
- **Accuracy:** Ensures accuracy of work and makes corrections in a timely manner. Is conscientious and monitors own quality of work.
- **Attendance:** Arrives on time for work and demonstrates good attendance record.
- **Organizational Awareness:** Understands and follows the rules, policies and laws that govern work. Identifies key decision-makers; understands and respects the balance of authority. Acts in an ethical manner.

**Education:**

Check the one box indicating minimum education requirements for this position for a new employee the first day of work:

- |  |  |
|--|--|
| <input type="checkbox"/> No education required | <input type="checkbox"/> Related AAS/2-years college/vocational training |
| X High school diploma or equivalent            | <input type="checkbox"/> Related Bachelor's Degree                       |
| X 1-year related college/voc. training         | <input type="checkbox"/> Related Master's degree                         |

**Please specify the acceptable and related fields of study:**

Office Management, Business, Information Technology

**Required/Acceptable:**

**Related:**

**Other education, training, certification, or licensing required (specify):** None Specified

**Experience:**

Check the one box indicating minimum work-related experience requirements for this position for a new employee the first day of work:

- |   |  |
|---|--|
| <input type="checkbox"/> No prior experience required | <input type="checkbox"/> 3 to 4 years    |
| X 1 to 2 years  | <input type="checkbox"/> 5 or more years |

**Other specific experience (optional):**

**Alternative Qualifications:**

This agency will accept alternative methods of obtaining necessary qualifications.

X Yes ☐ No

***Alternative qualifications include:***

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***SECTION IV – Other Important Job Information***

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Work is performed in a normal office environment, and the position requires the ability to communicate effectively in person, in writing, and over the phone. Work flow varies in work priority, compliance with customer requests, work volumes, and office or project needs.

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**SECTION V – Signatures**

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My signature below (typed or hand written) indicates the statements in Section I to IV are accurate and complete.

***Employee:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Immediate Supervisor:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Deputy:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

***Department Designee:***

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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